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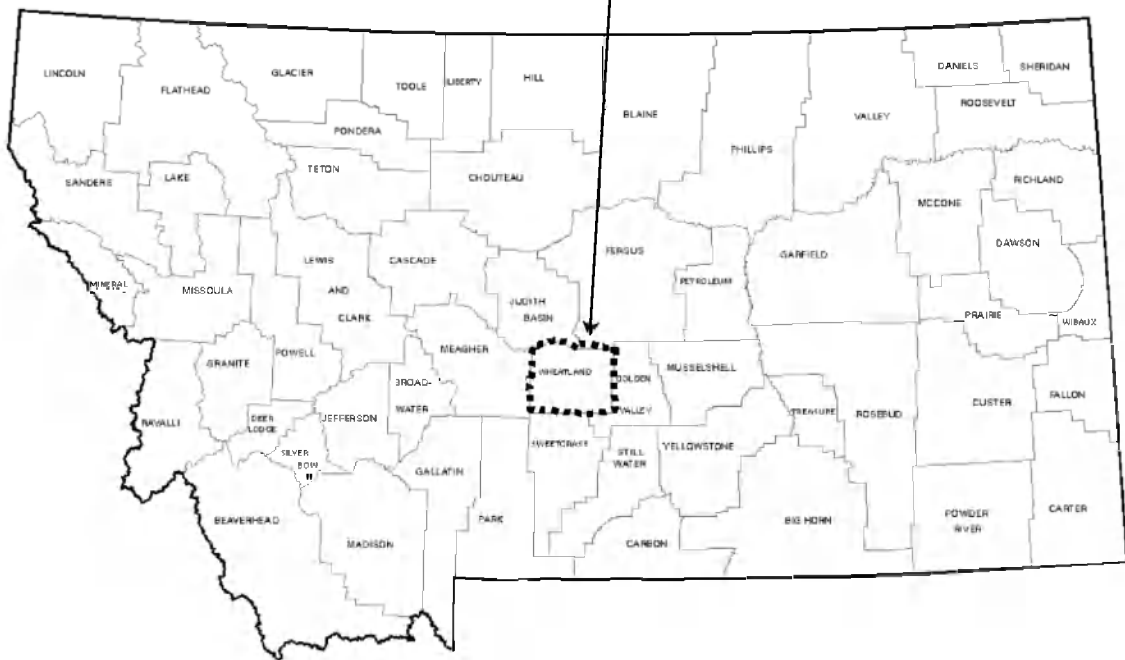
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Wheatland County Resident Attitudes: Exploring Local Tourism Development Potential

Area of Study: Wheatland County



March 2005



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Wheatland County Resident Attitudes: Exploring Local Tourism Development Potential

As Part of the
Montana Community Tourism Assessment Program (CTAP) 2004-2005

James Wilton

Research Report 2005-2
March 2005

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Executive Summary

This report presents information about tourism and recreation in Wheatland County in central Montana, and throughout the state. It offers estimated travel volume and traveler characteristics for overnight visitors to Wheatland County, which was extrapolated from the 2001/2002 Nonresident Travel Study dataset, and includes the results of a 2004 Wheatland County resident attitude survey. This survey provides residents' opinions and attitudes regarding tourism and its development in Wheatland County, and compares those results with a 2004 statewide survey.

The Wheatland County resident attitude survey represents responses from a sample of 186 Wheatland County and Martinsdale households in the fall of 2004, and a statewide random sample of 410 Montana households in the same period. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households. A week later, the first round of questionnaires was mailed followed by a reminder/thank-you postcard one week later. Two weeks after mailing the postcards, replacement questionnaires were sent to those households who had not yet responded. The final adjusted response rate was 43 percent for Wheatland County, and 47 percent for the state.

The following bulleted points offer highlights of the 2001/2002 Nonresident Travel Study for the 4-County area¹ (Golden Valley, Meagher, Musselshell, Wheatland) and the state, in addition to the 2004 Wheatland County and statewide resident attitude surveys. A more detailed analysis is found in the remainder of the report.

Nonresident Visitors (2001/2002 Nonresident Survey Data and 2003 Visitor Estimates):

- In the year 2003, over four million nonresident travel groups visited Montana. Of those, about 339,000 groups traveled through the 4-County area, and 151,000 drove through Wheatland County.
- Over \$1.8 billion was spent statewide in 2003 by nonresident travelers with more than \$8 million being spent in the 4-County area. Statewide this amounts to approximately \$2,042 for every Montana resident, and \$854 for 4-County area residents.
- A majority (63%) of nonresident overnight visitors in the 4-County area were primarily just passing through the state, compared to 26 percent at the statewide level. Twenty-one percent were on vacation.
- Ninety-one percent of visitors to the 4-County area had visited Montana before their trip, and 15 percent had previously lived in the state.
- About half (51%) of the 4-County area visitors traveled as friends, but many also traveled as couples (22%) or alone (12%).
- Overnight visitors to the 4-County area were more likely than statewide visitors to stay in a hotel, but were less likely to stay with friends or relatives.
- The largest group (61%) of the 4-County area overnight visitors had an annual income of \$20,000 to \$39,999, while over half (51%) of statewide visitors had incomes over \$60,000.
- More than three-quarters (80%) of overnight visitors to the 4-County area found information from the Internet to be the most useful information source of the sources listed to plan their trip, and service persons (74%) were the most useful during their trip.
- Vacationers in the 4-County area were attracted to Montana primarily because of Yellowstone National Park (58%) and visiting family and friends (13%).
- Visitors to the 4-County area spent the largest portion of their money (31%) on gasoline, followed by retail sales (20%), and restaurants (13%).

¹The 4-County area was selected for analysis since the overnight visitor sample size for Wheatland County alone was insufficient. However, even in the 4-County area, the sample size is only 50 respondents; therefore, caution should be taken when using these numbers.

Resident Characteristics and Attitudes about Tourism (2004 Resident Attitude Survey):

- Respondents from Wheatland County have resided in their community for 31 years and in the state for 46 years compared to the statewide respondents who have lived in their community for 24 and in the state for 33 years.
- Montana natives comprise 65 percent of the Wheatland County sample.
- The largest portion (22%) of Wheatland County residents earns their household income in the agricultural sector.
- The majority (74%) of Wheatland County respondents feel the tourism industry should have a role at least equal to other industries in the local economy, and ranked the industry sixth on a list of eight desired economic development options.
- More than two-thirds (71%) of Wheatland County residents work in places that they perceive to supply little or none of their products or services to tourists or tourist businesses.
- While 55 percent of Wheatland County respondents have infrequent contact with tourists, two-thirds (67%) enjoy meeting and interacting with tourists.
- Wheatland County residents do not show as strong of an attachment to their community as do statewide respondents.
- More than half (59%) of Wheatland County respondents feel that the population in the area is decreasing, and of those, 58 percent feel it is decreasing too fast.
- Wheatland County residents feel that tourism can enhance their quality of life by improving museums and cultural centers, job opportunities and the education system.
- The respondents of Wheatland County are more supportive of tourism development than statewide residents.
- Residents of Wheatland County strongly agree that decisions about tourism development should involve residents of the community, as do statewide respondents.
- Job opportunities are perceived as the primary advantage of increased tourism in Wheatland County, while "no disadvantage" is the leading disadvantage.
- Strong majorities expressed that Harlowton's railroad history is important for tourism and should be promoted to visitors.
- Survey respondents suggested that better, friendlier customer service could encourage visitors to stay longer in the area.
- Hunting and fishing access were the main recreational opportunities that respondents believed should be developed for visitors and residents.

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Introduction

This report is intended to provide an analysis of Wheatland County and statewide resident attitudes toward tourism development, as well as a profile of recent visitors to the 4-County area² (Golden Valley, Meagher, Musselshell, Wheatland). It combines the results of three different studies and is presented in two sections. The first section contains local nonresident visitor profiles, as well as profiles for statewide visitors. The visitor profiles were developed using research conducted by ITRR throughout 2001 and in the fall of 2002. Data from nonresident travelers spending at least one night in the 4-County area were used for the profile information.

The second section of this report contains an assessment of resident attitudes toward tourism in Wheatland County. This assessment is the result of a survey obtained from households throughout the county and the town of Martinsdale³ in the fall 2004. It is provided side by side with the same inquiries collected at the state level in 2004 to provide a comparison between resident opinions toward tourism in Wheatland County and in Montana as a whole.

Information for this report was gathered as part of the Community Tourism Assessment Program (CTAP), which is conducted in three Montana communities each year. Wheatland County was selected for the 2004/2005 CTAP, together with the Rocky Boy Reservation and the City of Helena.

Funding for this research comes from Montana's Accommodations Tax. Copies of this report can be downloaded from ITRR's web site (www.itrr.umt.edu) at no charge.

²The 4-County area was selected for analysis since the overnight visitor sample size for Wheatland County alone was insufficient. Overnight visitors are important for analysts and marketers due to their more inclusive spending patterns compared to day trippers. However, even in the 4-County area, the sample size is only 50 respondents; therefore, caution should be taken when using these numbers.

³The town of Martinsdale was included in the survey since the CTAP committee felt that many Martinsdale residents feel connected (geographically, economically, etc.) to Wheatland County. Therefore, it was thought to be appropriate to include their opinions.

Section 1: The 2001/2002 Nonresident Travel Study

Methodology

Travelers to Montana during the 2001 travel year (December 1, 2000 - November 30, 2001) and the fall of 2002 (October 1 – November 30, 2002) were intercepted for the 2001/2002 Nonresident Travel Study. The traveler population was defined as those travelers entering Montana by private vehicle or commercial air carrier during the study period, and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons traveling in a plainly marked commercial or government vehicle such as a scheduled or chartered bus, or commercial vehicles. Also excluded were those travelers who entered Montana by train. Other than these exceptions, the study attempted to assess all types of travelers to the state.

Data were obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state. During the fourteen-month study period, 11,996 questionnaires were delivered to visitor groups (Table 1). Usable questionnaires were returned by 4,595 groups, resulting in a response rate of 38 percent. Of those groups, 4,082 reported spending the night in Montana. A sub-sample of 389 respondent groups traveled through the 4-County area (Golden Valley, Meagher, Musselshell, Wheatland), with 50 of them spending at least one night in the area.

Table 1: Sample Sizes and Response Rates for the 2001/2002 Nonresident Travel Study

Questionnaires delivered	11,996
Usable questionnaires returned	4,595
Nonresident Travel Study response rate	38%
Overnight visitors	4,082
Nonresidents who drove through 4-County* area	389
4-County area overnights (spent at least 1 night)	50

*The 4-County area includes Golden Valley, Meagher, Musselshell and Wheatland counties.

A Profile of Recent Montana Visitors

This section presents a profile of Montana visitors from the 2001/2002 nonresident survey. Group characteristics are reviewed for both statewide visitors as well as travelers to the 4-County area. Profile information for overnight visitors to Wheatland County alone is not included due to insufficient sample sizes. In addition, please bear in mind that the following visitor profile information for the 4-County area is based on a sample of only 50 respondents who spent at least one night in the area; therefore, caution should be taken when using these numbers.

Group Characteristics

Travel group characteristics for the 4-County area were obtained from visitors who spent at least one night in the area. Tables 2 and 3 show several differences between the travel groups staying overnight in this travel area and throughout Montana.

Table 2 : Reasons for Traveling to Montana

	4-County area		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	81%	21%	62%	43%
Visit family or friends	22%	10%	29%	16%
Business	6%	4%	11%	9%
Passing through	61%	63%	34%	26%
Shopping	--	--	8%	2%
Other	2%	2%	7%	5%

Source: ITRR 2001/2002 Nonresident Travel Study. The 4-County area includes Golden Valley, Meagher, Musselshell and Wheatland counties. 4-County overnight visitors n=50; statewide all visitors n=4595. *Visitors could indicate more than one reason. **Percentages may not add to 100 due to rounding.

Table 3 : Characteristics of Nonresident Visitors

	4-County area	Statewide
Group Type		
Friends	51%	6%
Couple	22%	40%
Alone	12%	18%
Family	10%	28%
Family & friends	4%	4%
Business associates	1%	2%
Organized group	--	1%
Have previously visited Montana	91%	80%
Have previously lived in Montana	15%	17%
Nights spent in Montana	4.1	4.4
Accommodations used in Montana		
Hotel, motel, B&B	54%	47%
Private campground	15%	14%
Home of friend or relative	13%	17%
Public campground	12%	10%
Private cabin/2 nd home	1%	4%
Rented cabin/home	--	2%
Other	4%	6%
Income		
Less than \$20,000	7%	7%
\$20,000 to \$39,999	61%	17%
\$40,000 to \$59,999	11%	25%
\$60,000 to \$79,999	3%	20%
\$80,000 to \$99,999	6%	11%
Over \$100,000	11%	20%
Place of Primary Residence	NY (50%)	WA (13%)
	ALB, WA (5%)	CA (7%)
	AK, TX (4%)	ALB, MN (6%)
	BC, CO, ID (3%)	ID, ND, WY (5%)
	GER, SC (2%)	CO, OR (4%)

Source: ITRR 2001/2002 Nonresident Travel Study. 4-County overnight visitors n=50; statewide all visitors n=4595. Percentages may not add to 100 due to rounding.

Compared to the statewide sample, overnight visitors to the 4-County area are mostly passing through, while fewer are on vacation or visiting family and or friends. Similarly, group types are noticeably different between the two samples; over half of the 4-County sample traveled with friends while that group type accounted for only six percent of the statewide sample. Also, the 4-County area travelers are repeat visitors to Montana by a larger margin than statewide travelers, and have considerably lower incomes.

Information Sources

Nonresident travel groups indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as while they were *visiting* Montana. Also, respondents indicated which of the sources were most useful to them. A list of nine pre-trip and five Montana information sources was included in the questionnaire (Table 4).

Table 4: Travel Information Sources

Information Sources Used <u>Prior to Visiting</u> Montana	4-County area		Statewide	
	All Sources*	Most Useful Source**	All Sources*	Most Useful Source**
The Internet	62%	80%	37%	39%
Information from private businesses	13%	--	9%	9%
Auto club	8%	7%	23%	24%
National Park brochure	5%	2%	14%	7%
Montana Travel Planner	5%	--	8%	5%
Chamber or visitor bureau	4%	1%	8%	4%
Travel guide book	1%	3%	10%	8%
Travel agency	3%	4%	4%	3%
1-800 State travel number	3%	2%	1%	1%
None of the sources	27%	n/a	41%	n/a
Information Sources Used <u>While Visiting</u> Montana				
Highway information signs	11%	13%	32%	27%
Brochure racks	59%	4%	24%	17%
Service person (motel, restaurant, gas station, etc.)	63%	74%	29%	26%
Visitor information center	8%	9%	22%	24%
Billboards	2%	--	12%	5%
None of these sources	20%	n/a	39%	n/a

Source: ITRR 2001/2002 Nonresident Travel Study. 4-County overnight visitors n=50; statewide all visitors n=4595.

*Visitors could indicate more than one information source. **Percentages may not add to 100 due to rounding.

Regarding information sources used prior to visiting Montana, several differences between the two groups appear. The 4-County group used the Internet considerably more than statewide respondents; both when comparing all sources and the most useful source. Conversely, the 4-County sample used auto clubs much less frequently than statewide respondents. Furthermore, a couple of differences emerge between the groups in relation to information sources used while visiting Montana. Service persons were the most useful information source for the 4-County group by nearly three times the margin than for the statewide sample. However, the statewide group found highway information signs more useful than the 4-County area visitors.

Montana Attractions and Activities

Respondents who indicated that one purpose for their trip was vacation were asked what attracted them to Montana as a vacation destination. They were asked to check all pertinent attractions, and then indicate one *primary* attraction (Table 5). In addition they were asked about various recreation activities in which they participated (Table 6).

Table 5: Attractions of Montana as a Vacation Destination

	4-County area		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Open space	63%	6%	29%	11%
Mountains	61%	4%	35%	10%
Yellowstone National Park	58%	58%	31%	20%
Visiting family and friends	12%	13%	17%	13%
Lewis and Clark	10%	1%	7%	1%
Glacier National Park	9%	2%	21%	16%
Rivers/lakes	9%	--	24%	1%
Camping	8%	2%	14%	2%
Other Montana history	7%	2%	8%	3%
Wildlife	7%	3%	20%	1%
Fishing	6%	5%	11%	4%
Northern Great Plains	5%	--	6%	<1%
Hiking	2%	--	13%	<1%
Hunting	--	3%	3%	5%
Native American culture	--	--	6%	1%
Special events	--	--	5%	4%
Other	4%	2%	7%	7%

Source: ITRR 2001/2002 Nonresident Travel Study. 4-County overnight visitors n=50; statewide all visitors n=4595.

*Visitors could indicate more than one attraction. **Percentages may not add to 100 due to rounding.

Table 6 : Recreation Activity Participation

	4-County area*	Statewide*
Shopping	18%	37%
Camping (developed area)	17%	19%
Picnicking	15%	22%
Wildlife watching	14%	29%
Camping (primitive areas)	12%	8%
Visiting Lewis and Clark sites	12%	13%
Visiting museums	12%	16%
Day hiking	11%	26%
Visiting other historic sites	11%	23%
Gambling	7%	8%
Nature studies	7%	9%
Visiting Native American sites	7%	12%
Fishing	6%	13%
River floating/rafting	6%	5%
Special event/festivals	4%	9%
Canoeing/kayaking	2%	3%
Sporting event	2%	3%
Golfing	1%	5%
Backpacking	--	3%
Motor boating, water skiing	--	4%
Off-road/ATV	--	2%
Road/mountain biking	--	5%
Sailing/windsurfing	--	<1%

Source: ITRR 2001/2002 Nonresident Travel Study. 4-County overnight visitors n=50; statewide all visitors n=4595. *Visitors could indicate more than one activity.

Looking at the attractions of Montana list, the 4-County respondents preferred only Yellowstone National Park more than the statewide group. On the other hand, statewide respondents were more attracted to Glacier National Park, mountains and open space than the 4-County group. Furthermore, the statewide sample participated in almost every recreation activity to much higher degrees than the 4-County group.

Economic Characteristics

Information about the number of visitors to an area and how much they spend during their visit is useful for planning purposes. While the preceding travel group characteristics are based only on groups who spent at least one night in the 4-County area or the state, economic information represents all groups who spent money in the county or state whether they stayed a night or not (Table 7).

Table 7 : Expenditures of Nonresident Travelers

Distribution of Expenditures	4-County area	Statewide
Gas, oil	31%	22%
Retail sales	20%	21%
Restaurant, bar	13%	21%
Groceries, snacks	11%	7%
Lodging, campgrounds, etc.	11%	13%
Guides, outfitters	7%	4%
Auto rental and repair, transportation	5%	7%
Misc. expenses, licenses, fees	1%	4%
Total expenditures in sample area, 2003	\$8,198,000	\$1,874,000,000
Total travel groups to sample area, 2003	339,000	4,177,000
Total travel groups through Wheatland County only, 2003	151,000	
Travel group size (persons)	1.9	2.3
Population (2003)	9,600	917,621
Per capita expenditures in sample area	\$854	\$2,042

Source: ITRR 2001/2002 Nonresident Travel Study; U.S. Census Bureau, 2005⁴. 4-County all visitors n=358; statewide all visitors n=4595. Economic information updated 01/21/05; percentages may not add to 100 due to rounding.

Differences in expenditure distribution show that the 4-County area visitors spend a larger portion of their money on gasoline than statewide visitors. This is plausible considering most of these respondents are just passing through the area. But the statewide visitors spend considerably more on restaurant services, which seems reasonable considering more statewide visitors are on vacation. Lastly, expenditures per capita for the statewide sample are over two times the amount of the Wheatland County figure. This is likely due to travelers staying in the 4-County area for only part of their Montana trip (as they are just passing through), thus accounting for only part of their Montana trip expenditures.

⁴U.S. Census Bureau, 2005. Montana County Population Estimates: April 1, 2000 to July 1, 2002.

<<http://eire.census.gov/popest/data/counties/tables/CO-EST2002/CO-EST2002-01-30.php>> Accessed January 7, 2005.

Section 2: The Resident Attitude Study

Methodology

In an effort to help understand how residents feel about tourism and its impacts, a resident attitude survey was conducted. In the fall of 2004, a booklet-style questionnaire was administered to a sample of Wheatland County and Martinsdale residents⁵. A similar survey (although lacking Wheatland County-specific questioning) was also distributed to a statewide random sample during the same period and those results are reported here as well.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a population sample of 537 Wheatland County and Martinsdale households⁶, as well as 1,000 Montana residents. The letter informed recipients of the upcoming survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. A week later, a questionnaire was mailed to the same households, along with a cover letter from the local CTAP working group and a cover letter from ITRR stating in more detail the purpose and nature of the study.

One week following the questionnaire mailing, a postcard was sent to all selected households. This served the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and reminding those who had set it aside to complete it and return it in the postage-paid return envelope. After two more weeks, replacement questionnaires were sent to those households that had not yet responded to the first questionnaire mailing. Included this time was a different cover letter addressing some concerns respondents may have had that kept them from responding. The cut-off day for accepting returned questionnaires was four weeks following the last mailing. The survey instrument is included in Appendix A.

A non-response bias check was not conducted at the conclusion of the sampling effort. Such bias checks often take the form of a telephone interview to determine if those in the sample who did not respond to the questionnaire differ on key issues from those who did respond. In this case, the key questions where opinions may have differed involve statements of support for tourism development. These key questions could only be answered after considering other questions asked in the survey. It was therefore not possible to develop a condensed telephone non-response questionnaire.

The reader is cautioned to bear in mind that the results presented are the opinions of only 43 percent (186 households) of Wheatland County and Martinsdale residents polled (Table 8). It is assumed that respondents did not differ from non-respondents in their opinions.

Because the age distribution of the survey respondents differed from the 2000 Montana census estimates of age groups⁷, responses were weighted to more closely reflect the population of Wibaux County. The results presented in this report reflect the adjusted dataset, with the exception of demographic and open-ended questions.

Table 8 : 2004 Wheatland County and Statewide Survey Samples

	Wheatland Co.	Statewide
Resident questionnaires mailed	537	1000
Undeliverable questionnaires	108	125
Completed questionnaires	186	410
Response rate	43%	47%

⁵The town of Martinsdale was included in the survey since the CTAP committee felt that many Martinsdale residents feel connected (geographically, economically, etc.) to Wheatland County. Therefore, it was thought to be appropriate to include their opinions.

⁶537 surveys were sent out since that was the maximum number of valid addresses available for purchase for Wheatland County and Martinsdale. The sample of addresses was purchased from Survey Sampling, Inc: Fairfield, CT.

⁷U.S. Census Bureau, 2004. Table QT-P1 Age Groups and Sex, 2000.

<<http://factfinder.census.gov/servlet/QTTable?geo_id=04000US30&ds_name=DEC_2000_SF1_U&qr_name=DEC_2000_SF1_U_QT_P1&lang=en&sse=on>> Accessed December 1, 2004.

Wheatland County Resident Attitudes

When a community pursues tourism as a development strategy, the goals of that effort can often include an improved economy, more jobs for local residents, community stability, and ultimately, a stable or improved quality of life for the community's residents. On the other hand, negative impacts can also result from tourism development strategies that are not carefully considered. Understanding residents' perceptions of the conditions of their surroundings and tourism's influence on those conditions can provide guidance toward appropriate development decisions.

Residents of an area may hold a variety of opinions about tourism and other forms of economic development. They may have both positive and negative perceptions of the specific effects of tourism. Attitudes and opinions are good measures for determining the level of support for community and industry decisions. The resident attitude questionnaire addressed topics that provide a picture of perceived current conditions and tourism's potential role in the community.

Respondent Characteristics

In this section, several respondent demographic details are reported for Wheatland County residents and the statewide respondents. In Table 9, respondents indicated their age, gender, residency and employment status.

Table 9 : Respondent Characteristics

	Wheatland Co.	Statewide
Age and Gender Characteristics		
Average age	56 years	48 years
Minimum age	20 years	23 years
Maximum age	93 years	96 years
Percent male	58%	55%
Percent female	42%	45%
Residency Characteristics		
Born in Montana	65%	52%
Mean years lived in Montana	46 years	33 years
Mean years lived in community	31 years	24 years
Rural, out-of-town community	n/a	34%
Urban, in-town community	n/a	66%
Community Residency		
10 years or less	38%	32%
11 to 20 years	14%	15%
21 to 30 years	16%	18%
31 to 40 years	8%	16%
41 to 50 years	9%	10%
51 years or more	15%	9%
Employment Status		
Employed	58%	68%
Retired	34%	20%
Homemaker	5%	7%
Unemployed	3%	6%
Mean household employment (persons)	1.2	1.5
Source of Household Income*		
Agriculture	22%	12%
Finance, Insurance or Real Estate	14%	6%
Education	10%	16%
Health care	10%	23%
Services	10%	16%
Professional	8%	30%
Retail/wholesale trade	8%	15%
Restaurant or bar	6%	8%
Transportation, communication or utilities	5%	8%
Forestry or forest products	4%	4%
Construction	3%	12%
Clerical	2%	7%
Manufacturing	2%	8%
Armed Services	1%	3%
Travel industry	<1%	3%
Other**	11%	21%

*Respondents could check more than one household income source. **Twenty Wheatland County residents selected the "other" category; the most common response was retired (7), followed by ranch hand (3), mining, senior center and government (2 each). Wheatland n=186, state n=410.

Compared to the statewide sample, Wheatland County respondents were older and had more retirees, had a higher percentage born in Montana, lived in Montana longer, worked in agriculture more, but had less employment in various service and professional occupations. Many of these differences, especially age and occupation, reflect U.S. Census figures⁸ for Wheatland County and the state.

Tourism and the Local Economy

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community's economy, and whether their employment was dependent on tourism (Table 10). In addition, they ranked industries on a scale from 1 (most desired) to 8 (least desired) indicating which they felt would be most desirable for their community (Table 11).

Table 10: Role of and Dependency on Tourism

	Wheatland Co.	Statewide
Role of Tourism in the Local Economy		
No role	4%	3%
A minor role	23%	23%
A role equal to other industries	58%	58%
A dominant role	16%	16%
Employment's Dependency on Tourists for Business		
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	5%	6%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	37%	30%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	34%	36%
I currently do not have a job	24%	28%

Percentages may not add to 100 due to rounding. Wheatland n=186, state n=410.

Table 11: Desirability of Economic Development Alternatives

	Wheatland Co.		Statewide	
	Rank	Mean*	Rank	Mean*
Agriculture	1	2.94	3	3.73
Services	2	3.66	1	3.12
Manufacturing	3	3.67	4	4.28
Retail/wholesale trade	4	4.07	5	4.34
Technology	5	4.48	2	3.30
Tourism and recreation	6	4.62	6	4.44
Wood products	7	5.65	7	5.86
Mining	8	6.49	8	6.72

* Scores represent the mean of responses measured on a scale from 1 (most desired) to 8 (least desired). Wheatland n=186, state n=410.

Taking both of these tables together sheds light on both similarities and differences between the two respondent groups. For instance, both samples had nearly identical responses regarding the role of tourism in the local economy. Likewise, both groups had similar proportions about their employment's dependency on tourists for their business. However, the respondent groups diverged somewhat on the desirability of five

⁸ U.S. Census Bureau. 2005. <http://www.census.gov>. Accessed February 16, 2005.

economic development options; Wheatland County residents were more favorable toward agriculture, manufacturing and trade while less approving of services and technology than the statewide residents. Both groups ranked tourism and recreation sixth and gave the industry fairly similar mean scores.

Interactions with Tourists in the Community

The extent of interaction between tourists and residents can affect the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior may be a reflection of those same attitudes and opinions. Respondents were asked questions to determine the extent to which they interact with tourists on a day-to-day basis as well as how they enjoy those interactions (Table 12).

Table 12: Interaction with Tourists

	Wheatland Co.	Statewide
Frequency of Contact with Tourists Visiting Community		
Frequent contact	11%	10%
Somewhat frequent contact	34%	23%
Somewhat infrequent contact	28%	36%
Infrequent contact	27%	31%
Attitude Toward Tourists Visiting Community		
Enjoy meeting and interacting with tourists	67%	63%
Indifferent about meeting and interacting with tourists	25%	34%
Do not enjoy meeting and interacting with tourists	8%	4%

Percentages may not add to 100 due to rounding. Wheatland n=186, state n=410.

The Wheatland County group reported having more frequent contact with visitors than the statewide sample, although majorities in both groups have some degree of infrequent contact. However, nearly two-thirds of both groups expressed that they enjoy interaction with visiting tourists. So even though both groups generally have infrequent contact with tourists, they enjoy their interaction with them when it does occur.

Community Attachment and Change

One measure of community attachment may be the length of time and portion of life spent in a community or area. These statistics were reported earlier in the report (Table 9). Other measures may be based on opinions that residents have about their community and perceived changes in population levels.

To help assess community attachment, respondents were asked to indicate their level of agreement with each of three statements on a scale from -2 (strongly disagree) to +2 (strongly agree). A mean response greater than 0 indicates aggregate agreement with the statement in question, and responses with a negative score means some degree of disagreement (Table 13). The larger the absolute size of the mean the stronger the level of agreement or disagreement.

Table 13: Index of Community Attachment

	Wheatland Co.					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I'd rather live in my community than anywhere else.	4%	27%	53%	17%	.53	2%	21%	51%	27%	.79
If I had to move away from my community, I would be very sorry to leave.	2%	26%	54%	18%	.59	1%	22%	49%	28%	.82
I think the future of my community looks bright.	13%	50%	32%	4%	-.35	3%	28%	59%	10%	.45
Index of Community Attachment**	.26					.69				

Percentages may not add to 100 due to rounding. Wheatland n=186, state n=410.

*Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

**Index scores are the mean average of the mean scores for the three community attachment statements.

Table 14: Perceptions of Population Change

	Wheatland Co.	Statewide
Population is not changing	31%	10%
Population is increasing	10%	76%
Population is decreasing	59%	14%
<i>If you feel the population in your community is changing, how would you describe the rate of change?</i>		
Too fast	58%	50%
About right	28%	44%
Too slow	14%	6%

Wheatland n=186, state n=410.

Overall community attachment for Wheatland County and statewide residents scored positive, suggesting that both respondent groups feel attached to their local community to some degree. Yet there was stronger agreement among the statewide residents for all three variables and the resulting overall community attachment index score.

In stark contrast to statewide residents, most Wheatland County respondents feel the local population is decreasing. Yet, like the statewide group, they believe the rate of population change is occurring too fast. According to the U.S. Census, the population of the Wheatland County increased .6 percent from 1990 to 2000, but decreased 6.8 percent from 2000 to 2003⁹. Census figures also show that the statewide population increased by 12.9 percent between 1990 and 2000, and increased another 1.7 percent from 2000 to 2003¹⁰.

Quality of Life - Current Conditions and Tourism's Influence

The concept of "Quality of Life" can be broken down into several independent aspects, such as the availability and quality of public services, infrastructure condition, stress factors such as crime and unemployment, and overall livability issues such as cleanliness. When evaluating the potential for community tourism development, it is often desirable to get an understanding of residents' opinions of the

⁹U.S. Census Bureau, 2005. Montana Quick Facts. <http://quickfacts.census.gov/qfd/states/30/30107.html>. Accessed 02/16/05.

¹⁰U.S. Census Bureau, 2005. Montana Quick Facts. <http://quickfacts.census.gov/qfd/states/30000.html>. Accessed 02/16/05.

current quality of life in their community. This approach helps identify existing problem areas within the community, in turn providing guidance to planners and decision-makers. It is also informative to understand how increased tourism might change residents' perceptions of these current quality of life conditions. Such perceptions often define residents' attitudes toward this type of community development.

To address this, respondents were asked to rate the current condition of a number of factors that comprise their current level of quality of life using a scale ranging from -2 (very poor condition) to +2 (very good condition). They were then asked to rate how they believed increased tourism would influence these factors. The influence of tourism was rated using a scale of -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 15 and 16).

Table 15: Quality of Life—Current Condition

	Wheatland Co.					Statewide				
	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Mean Score*	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Mean Score*
Traffic congestion	0%	1%	38%	61%	1.60	19%	31%	37%	13%	-.05
Emergency services	2%	6%	54%	39%	1.21	0%	6%	64%	30%	1.17
Safety from crime	1%	6%	59%	33%	1.17	2%	10%	61%	27%	1.01
Overall community livability	1%	10%	57%	32%	1.08	2%	6%	61%	32%	1.14
Parks and recreation areas	2%	12%	60%	27%	.98	3%	8%	52%	37%	1.14
Condition of roads and highways	1%	18%	60%	21%	.82	9%	31%	52%	8%	.18
Education system	7%	10%	59%	24%	.82	2%	21%	56%	22%	.74
Cost of living	6%	13%	60%	21%	.77	16%	37%	39%	8%	-.13
Museums and cultural centers	7%	16%	57%	21%	.69	7%	15%	57%	21%	.71
Overall cleanliness and appearance	4%	27%	53%	16%	.49	2%	15%	58%	25%	.90
Infrastructure	11%	25%	55%	10%	.29	4%	14%	70%	12%	.72
Job opportunities	33%	55%	9%	2%	-1.07	24%	43%	28%	5%	-.53
Overall Mean**	.74					.58				

Percentages may not add to 100 due to rounding. Wheatland n=186, state n=410.

*Scores represent mean responses measured on a scale from -2 (very poor condition) to +2 (very good condition). The higher the score, the better is the perceived condition of the variable. **Overall scores are the mean of the mean scores.

Table 16: Quality of Life—Tourism's Influence

	Wheatland Co.					Statewide				
	Negative Influence	Positive & Negative Influence	Positive Influence	No Influence	Mean Score*	Negative Influence	Positive & Negative Influence	Positive Influence	No Influence	Mean Score*
Museums and cultural centers	1%	4%	91%	4%	.95	1%	9%	83%	7%	.89
Job opportunities	4%	11%	74%	11%	.79	6%	23%	60%	12%	.61
Education system	1%	14%	44%	42%	.72	2%	15%	31%	51%	.58
Parks and recreation areas	5%	19%	67%	10%	.69	10%	31%	49%	11%	.43
Overall cleanliness and appearance	5%	30%	53%	13%	.55	13%	40%	36%	11%	.25
Overall community livability	4%	27%	46%	23%	.55	8%	51%	27%	15%	.22
Infrastructure	7%	19%	37%	38%	.49	19%	29%	17%	35%	-.04
Emergency services	5%	34%	40%	22%	.45	12%	37%	24%	27%	.17
Conditions of roads and highways	17%	24%	38%	21%	.28	28%	34%	28%	10%	.01
Cost of living	14%	37%	32%	18%	.22	30%	30%	23%	17%	-.08
Safety from crime	21%	37%	22%	20%	.01	24%	42%	14%	20%	-.12
Traffic congestion	27%	20%	19%	35%	-.13	62%	24%	7%	8%	-.60
Overall Mean**	.46					.19				

Percentages may not add to 100 due to rounding. Wheatland n=186, state n=410.

*Scores represent responses measured on a scale from -1 (negative influence) to +1 (positive influence); "no influence" response not included in individual or overall scores. The higher the score, the more positive the perceived influence of increased tourism on the condition of the variable. **Overall scores are the mean average of the mean scores.

Considering both the current condition and tourism's influence on quality of life, several interesting differences emerge. All but one of the current condition variables had positive scores for Wheatland County residents, indicating that these items seem to be in some degree of good condition. Likewise, all the variables except one received a positive score when considering tourism's influence upon them, suggesting that Wheatland County residents see benefits to their quality of life with increased tourism. Statewide residents, on the other hand, did not feel as strongly about their current quality of life, and they felt that tourism's influence would amount to much more modest improvement compared to Wheatland County residents.

Perceived Connections Between Tourism and Community Life

Tourism Support

In addition to tourism's perceived influence on quality of life, another method of measuring the degree of support for tourism development is to ask respondents questions specific to the tourism industry and about interactions with tourists. Respondents were asked to indicate their level of agreement or disagreement with a number of tourism-related statements. Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 17).

The perceived lack of connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, and also a reason for the modest score on the Index of Tourism Support by Montana residents. Overall, however, respondents support continued tourism promotion by the state even though they may not see a direct economic benefit from these efforts.

Table 17: Index of Tourism Support

	Wheatland Co.					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
Tourism increases opportunities to meet people of different backgrounds and cultures.	2%	7%	73%	18%	.99	1%	9%	76%	15%	.94
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	5%	5%	71%	20%	.94	5%	10%	70%	15%	.79
The overall benefits of tourism outweigh the negative impacts.	7%	13%	67%	14%	.69	4%	18%	68%	10%	.62
Increased tourism would help my community grow in the right direction.	4%	16%	68%	12%	.67	5%	24%	61%	11%	.48
Tourism promotion by the state of Montana benefits my community economically.	2%	21%	62%	15%	.65	3%	11%	73%	13%	.81
I believe jobs in the tourism industry offer opportunity for advancement.	4%	28%	60%	8%	.39	12%	36%	50%	2%	-.04
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	9%	28%	54%	10%	.28	11%	46%	40%	3%	-.24
My community is a good place to invest in tourism development.	7%	32%	54%	8%	.25	4%	20%	65%	10%	.57
If tourism increases in my community, my income will increase or be more secure.	18%	50%	24%	8%	-.45	17%	54%	24%	6%	-.53
I will benefit financially if tourism increases in my community.	19%	52%	22%	8%	-.52	19%	54%	21%	6%	-.58
Index of Tourism Support**	.39					.28				

Percentages might not add up to 100% due to rounding. Wheatland n=186, state n=410.

*Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

**The Index of Tourism Support is the overall mean average of the mean scores for each statement.

On the whole, Wheatland County respondents show more support for tourism than statewide residents. Specifically, Wheatland County residents shared much more agreement than the statewide group regarding more tourism improving quality of life and tourism jobs offering advancement opportunities. These more positive perceptions of tourism, and several others, could help facilitate local efforts in developing tourism-related activities.

Tourism Concerns

In addition to asking respondents about their support for tourism, they were queried about some concerns that also affect their attitudes and opinions regarding tourism (Tables 18-20). Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates aggregate agreement, while a negative score implies disagreement (Table 18).

Table 18: Index of Tourism Concern

	Wheatland Co.					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	1%	20%	66%	14%	.73	1%	14%	67%	19%	.89
Tourists do not pay their fair share for the services they use.	4%	39%	40%	17%	.26	3%	38%	38%	21%	.34
Vacationing in Montana influences too many people to move to the state.	8%	57%	23%	11%	-.28	4%	45%	38%	13%	.10
In recent years, Montana is becoming overcrowded because of more tourists.	16%	58%	16%	10%	-.53	8%	60%	23%	9%	-.36
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	16%	62%	13%	9%	-.63	9%	61%	22%	8%	-.42
Index of Tourism Concern**	-.09					.11				

Percentages might not add up to 100% due to rounding. Wheatland n=186, state n=410.

*Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

**The Index of Tourism Concern is the mean of the mean scores for each statement.

Table 19: Land Use Concern

	Wheatland Co.					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I would support land use regulations to help manage types of future growth in my community.	7%	22%	64%	7%	.43	4%	12%	64%	20%	.83
There is adequate undeveloped open space in my community.	2%	8%	72%	18%	.96	10%	29%	54%	8%	.23
I am concerned with the potential disappearance of open space in my community.	8%	48%	31%	12%	-.09	6%	33%	38%	23%	.41
Index of Land Use Concern**	.43					.49				

Percentages might not add up to 100% due to rounding. Wheatland n=186, state n=410.

*Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

**The Index of Land Use Concern is the mean of the mean scores for each statement.

Table 20: Tourism-related Decision-making

	Wheatland Co.					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
It is important that residents of my community be involved in decisions about tourism.	1%	5%	68%	26%	1.13	1%	2%	61%	36%	1.30
Decisions about how much tourism there should be in my community are best left to the private sector.	15%	53%	26%	7%	-.42	16%	57%	22%	6%	-.54
Overall Mean**	.36					.38				

Percentages might not add up to 100% due to rounding. Wheatland n=186, state n=410.

*Scores represent responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

**Overall scores are the mean of the mean scores.

Regarding concerns over tourism, Wheatland County residents seem less worried about increased tourism than statewide respondents. The Wheatland County group was much less concerned about visitors eventually moving to Montana, tourist overcrowding, and visitors limiting access to local recreation opportunities than the statewide group. Similarly, Wheatland County residents expressed less concern over specific land use issues than statewide respondents, even though their overall index scores were comparable. Finally, Wheatland County respondents mirrored the statewide group in their concerns over local tourism-related decision-making.

Advantages and Disadvantages of Tourism Development

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantages and disadvantages of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 21 and 22).

Table 21: Advantages Associated with Increased Tourism

	Wheatland Co.	
	Number of Responses*	Percent of Respondents
Economic growth	66	35%
Job opportunities	25	13%
Attract new residents	6	3%
None	6	3%
Improve quality of life	3	2%
Keep local towns alive	3	2%
Better streets, sidewalks	2	1%

*Respondents could offer more than one suggestion (n=116).

Table 22: Disadvantages Associated with Increased Tourism

	Wheatland Co.	
	Number of Responses*	Percent of Respondents
None	31	17%
More people, traffic	17	9%
Increased crime	9	5%
Increased trash, pollution	6	3%
Increased costs, prices	5	3%
Changing of way of life	4	2%

*Respondents could offer more than one suggestion (n=101).

Expectedly, the main advantages and disadvantages of increased tourism followed a similar pattern as in other recent resident attitude surveys around Montana¹¹. Job opportunities and economic growth are the major benefits residents anticipate with increased tourism, while no disadvantages and more people/traffic are the main disadvantages.


¹¹ Recent resident attitude surveys took place in Helena and the Wheatland County Reservation in 2004; in 2003 they were conducted in Cascade County, the Crow Reservation, and Wibaux County. See www.itr.umt.edu for the 2003 and upcoming 2004 reports.

Questions Specific to Wheatland County

The Wheatland County CTAP committee was given the opportunity to include questions specific to the region on the resident attitude questionnaire. The responses to these questions and other community-specific items are reported below (Tables 23-26). Several of the questions were open-ended and the responses were grouped together into relevant themes. Single responses and non-applicable answers were not included for presentation purposes.

To get an understanding of what Wheatland County residents think about various tourism-related issues, respondents were asked to rank the following statements according to their level of agreement or disagreement with them. Responses ranged from -2 (strongly disagree) to +2 (strongly agree); a positive score indicates agreement while a negative score indicates disagreement.

Table 23: Tourism and the Community

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean Score*
Harlowton's railroad history should be promoted to visitors.	1%	1%	12%	52%	34%	1.17
Harlowton's historic district is important to tourism in Wheatland County.	2%	3%	16%	49%	30%	1.02
I feel residents of Harlowton take pride in their community.	3%	18%	22%	49%	9%	.42
Harlowton's community appearance is attractive to visitors.	3%	27%	30%	31%	8%	.14
More public access (from Wheatland Co.) is needed to the Lewis & Clark National Forest.	10%	11%	31%	28%	20%	.38
<hr/>						
 <i>If you agree, how would you acquire more access?</i>				Number of Responses**	Percent of Respondents	
Purchase, obtain right-of-way land				12	6%	
Open more access roads, trails				11	6%	
Acquiring landowner consent				6	3%	
Prevent private landowners from gating access				5	3%	
Working with stakeholders				3	2%	
Have Forest Service open gated access roads				2	1%	
Ease agency regulations				2	1%	

Percentages might not add up to 100% due to rounding. N=186.

*Scores represent responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

**Respondents could offer more than one suggestion (n=53).

Table 24: Encouraging longer stays in Wheatland County

Question: What could local businesses do to encourage visitors to stay in Wheatland County longer?	Number of Responses*	Percent of Respondents
Better customer service, friendlier	15	8%
Offer more activities, attractions	11	6%
Make area cleaner	10	5%
Offer packages, discounts	9	5%
Promotion, advertising	8	4%
Nothing	6	3%
Open longer hours	6	3%
Be more competitive	4	2%
Build more hotels	4	2%
Open Bair museum	3	2%

*Respondents could offer more than one suggestion (n=94).

Table 25: Potential Development of Recreational Opportunities

Question: What outdoor recreational opportunities should be developed for both residents and visitors?	Number of Responses*	Percent of Respondents
Hunting	31	17%
River access, fishing	27	15%
Winter activities (skiing, snowmobiling, skating)	16	9%
ATV trails	8	4%
Swimming pool	7	4%
Rodeo	4	2%

*Respondents could offer more than one suggestion (n=89).

Table 26: Wheatland County's Image

Question: What image of Wheatland County should be promoted for tourism?	Number of Responses*	Percent of Respondents
Friendly people	22	12%
Railroad heritage	22	12%
Hunting, fishing	14	8%
Rich history	14	8%
Agricultural community	8	4%
Clean community	8	4%
Homestead heritage	7	4%
Open spaces	5	3%
Prairies to mountains	3	2%
Welcoming	2	1%

*Respondents could offer more than one suggestion (n=95).

These Wheatland County-specific questions help to give insights into residents' perceptions of local tourism-related questions. Overall, it seems that residents see a link between promotion of Harlowton's railroad history and increased tourism. Secondly, residents feel that more hunting and fishing opportunities should be developed for tourists and locals alike. Residents also take pride in their community and believe they could promote an image of friendliness and their history and heritage for tourists visiting Wheatland County. Local businesses that provide better customer service and offer more attractions could encourage visitors to stay longer in the area. Lastly, residents expressed a desire for more access of national forest lands, rivers, and other areas. Taken together, these main points suggest that residents believe Wheatland County has potential for increasing tourism through its natural and historical attractions, and its small town, friendly atmosphere.

Conclusion

As part of the Community Tourism Assessment Program, the Wheatland County action committee is in a unique position to have a discussion with their community about local tourism development. In light of this, the resident attitude survey serves as a tool to assist the community in making informed decisions about tourism-related issues. The following points highlight the main findings from the survey and the nonresident study to help provide a context of tourism development potential in and around Wheatland County.

Overall, residents of Wheatland County express strong support for local tourism. Respondents believe that tourism should have a role in the local economy at least equal to other industries, if not a dominant role. Similarly, respondents showed considerable agreement about the advantages of increased tourism (jobs and economic growth), as well as tourism's positive influence on quality of life. Residents also expressed very little concern over increased tourism. Taken together, these attitudes suggest that Wheatland County residents not only look favorably toward tourism, but they would like it to play a larger role in the economy and community life.

Looking at nonresident overnight visitors who travel in the 4-County area (Golden Valley, Meagher, Musselshell, Wheatland), nearly two-thirds are passing through while less than one-quarter are on vacation. This may appear discouraging for local residents considering that pass through travelers are merely on their way to another destination. However, these travelers might be lured into spending some time in the area if they knew more about its attractions, history and facilities of the area. More than three-quarters of these travelers use the Internet for pre-trip planning purposes, and about the same percentage use information from service persons while on their trip. This suggests that Wheatland County (and Martinsdale) businesses and organizations might find it beneficial to have a website for their products or services. In addition, local people who work at businesses where travelers might visit could make sure to mention local attractions to visiting travelers.

Considering non-economic traveler attributes, the primary attraction was Yellowstone National Park, followed distantly by visiting family and friends. The top recreation activities for the visiting nonresident travelers were shopping, wildlife watching, and day hiking. However, the participation rates of these activities are less than half of statewide travelers, which suggests that if more of these types of activities were available in Wheatland County, perhaps some of the statewide travelers would be interested in visiting the area. In view of all of these nonresident traveler characteristics, there appears to be potential marketing and enterprise opportunities for local residents with an interest in travel-related business activities.

Both the resident attitude survey and the nonresident study have implications for tourism development in Wheatland County. Because the overall attitudes toward tourism seem positive, development of tourism programs or projects would likely find strong community support. Not only does there seem to be tourism business potential, but the prospects of increased job opportunities and economic growth would likely be welcomed.

Finally, Wheatland County residents have many unique attractions to share with visitors to the area. Their railroad history and homesteading heritage are evident throughout the area, while the natural landscape ranges from vast agricultural lands to expansive views of the Crazy, Little Belt and Big Snowy mountains. However, some residents expressed concern over the potential influences tourism could have on residents' lifestyles, as well as Wheatland County not offering what tourists want (see Appendix B). This suggests that even though most residents are favorable towards tourism development, they should also be mindful of all the impacts (both positive and negative) that increased tourism could have on Wheatland County and its communities.

Appendix A: Wheatland County Survey Instrument

Resident Attitudes Toward Tourism in Wheatland County and Martinsdale



Fall 2004

**Institute for Tourism and Recreation Research
The University of Montana
32 Campus Drive #1234
Missoula, MT 59812-1234**

Part 1. Please indicate your involvement in the tourism industry in Wheatland County and the role you think it should have in the local economy.

1a **How much contact do you have with tourists visiting Wheatland County? Please ☒ only one.**

☐ Frequent contact ☐ Somewhat frequent contact ☐ Somewhat infrequent contact ☐ Infrequent contact

1b **Which of the following statements best describes your behavior toward tourists in Wheatland County? Please ☒ only one.**

☐ I enjoy meeting and interacting with tourists. ☐ I am indifferent about meeting and interacting with tourists. ☐ I do not enjoy meeting and interacting with tourists.

1c **Which of the following statements best describes your job? Please ☒ only one.**

☐ I currently do not have a job. ☐ My place of work provides the majority of its products or services to tourists or tourism businesses. ☐ My place of work provides at least part of its products or services to tourists or tourism businesses. ☐ My place of work provides none of its products or services to tourists or tourism businesses.

1d **Compared to other industries, how important a role do you think tourism should have in Wheatland County? Please ☒ only one.**

☐ No role ☐ A minor role ☐ A role equal to other industries ☐ A dominant role

1e **What types of economic development would you like to see in Wheatland County? Please rank options 1 through 8, with 1 being the most desired.**

Agriculture	<input type="text"/>	Services (health, education, etc.)..	<input type="text"/>
Manufacturing	<input type="text"/>	Technology.....	<input type="text"/>
Mining	<input type="text"/>	Tourism/Recreation	<input type="text"/>
Retail/Wholesale Trade.....	<input type="text"/>	Wood Products.....	<input type="text"/>

1f **In your opinion, how is the population changing in Wheatland County? Please ☒ only one.**

☐ Population is not changing (please skip to PART 2) ☐ Population is increasing ☐ Population is decreasing

1g **If you feel the population of Wheatland County is changing, how would you describe the change? Please ☒ only one.**

☐ Too fast ☐ About right ☐ Too slow

PART 2. The following questions are specific to Harlowton and Wheatland County. Please share your thoughts and opinions as they will be helpful in making informed decisions for the county.

2a To what extent do you agree/disagree with the following statements? Please ☒ only one response for each item.

	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neutral</i>	<i>Agree</i>	<i>Strongly Agree</i>
1. Harlowton's historic district is important to tourism in Wheatland County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Harlowton's railroad history should be promoted to visitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Harlowton's community appearance is attractive to visitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I feel residents of Harlowton take pride in this community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. More public access (from Wheatland Co.) is needed to the Lewis & Clark National Forest.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5a. If you agree, how would you acquire more access?

2b What could local businesses do to encourage visitors to stay in Wheatland County longer?

2c What outdoor recreational opportunities should be developed for both residents and visitors?

2d What image of Wheatland County should be promoted for tourism?

Part 3. Questions concerning quality of life in your community.

3a

Please indicate your opinion of the current condition of each of the following quality of life elements in Wheatland County. Please ☒ only one response for each item.

	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Don't Know
Emergency services (police, fire, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums and cultural centers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety from crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition of roads and highways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure (water, sewer, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic congestion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall community livability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and recreation areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall cleanliness and appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3b

Please indicate how you think the following elements of quality of life would be influenced if tourism were to increase in Wheatland County. Please ☒ only one response for each item.

	Negative Influence	Both Positive and Negative	Positive Influence	No Influence	Don't Know
Emergency services (police, fire, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums and cultural centers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety from crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition of roads and highways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure (water, sewer, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Traffic congestion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall community livability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and recreation areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall cleanliness and appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3c

Please indicate your level of agreement or disagreement with each of the following statements regarding tourism in Wheatland County and in the state of Montana. Please ☒ only one response for each item.

	Strongly Disagree	Disagree	Agree	Strongly Agree
I'd rather live in my community than anywhere else.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If I had to move away from my community, I would be very sorry to leave.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I think the future of Wheatland County looks bright.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Wheatland County is a good place for people to invest in new tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Increased tourism in Montana would help Wheatland County grow in the right direction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important that residents of Wheatland County be involved in decisions about tourism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(continue on the following page)

3c continued:

Please indicate your level of agreement or disagreement with each of the following statements regarding tourism in Wheatland County and in the state of Montana. Please ☒ only one response for each item.

	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
Decisions about how much tourism there should be in Wheatland County are best left to the private sector rather than the public sector.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is adequate undeveloped open space in Wheatland County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am concerned about the potential disappearance of open space in Wheatland County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I would support land use regulations to help manage types of future growth in Wheatland County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourism promotion by the state of Montana benefits Wheatland County economically.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If tourism increases in Wheatland County, my income will increase or be more secure.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I will benefit financially if tourism increases in Wheatland County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I believe jobs in the tourism industry offer opportunity for advancement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Vacationing in Montana influences too many people to move to the state.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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In recent years, Montana is becoming overcrowded because of more tourists.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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My access to recreation opportunities is limited due to the presence of out-of-state visitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tourism in Montana increases opportunities to meet people of different backgrounds and cultures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourists in Montana do not pay their fair share for the services they use.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I believe most of the jobs in Montana's tourism industry pay low wages.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The overall benefits of tourism in Montana outweigh the negative impacts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3d In your opinion, what is the primary advantage of increased tourism in Wheatland County?

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3e

In your opinion, what is the primary disadvantage of increased tourism in Wheatland County?

PART 4. Please tell us a little bit about yourself. Keep in mind that this survey is completely confidential.

4a

How many years have you lived in Wheatland County or in Martinsdale?

4b

How many years have you lived in Montana?

4c

What is your age?

4d

Were you born in Montana? Please ☒ only one.

☐ Yes

☐ No

4e

What is your gender? Please ☒ only one.

☐ Male

☐ Female

4f

What is your employment status? Please ☒ only one.

☐ Employed

☐ Retired

☐ Home maker

☐ Unemployed or Disabled

4g

How many people currently living in your house are employed?

4h

If one or more are employed, please use the list below to let us know the type of work held by members of your household. Please ☒ all that apply.

☐ Agriculture

☐ Armed services

☐ Clerical

☐ Construction

☐ Education

☐ Finance, Insurance or Real Estate

☐ Forestry/forest products

☐ Health care

☐ Manufacturing

☐ Professional

Other:
(Please Specify)

☐ Restaurant/bar

☐ Retail/wholesale trade

☐ Services

☐ Transportation, Communication or Utilities

☐ Travel Industry

Please include any additional comments below.

Thank you for your participation!

Please place your completed questionnaire in the
postage-paid envelope and drop it in any mailbox.

Appendix B: Respondent Comments

Respondents were provided with space at the end of the questionnaire to include their own thoughts and comments. This was an open-ended format with no guidelines as to the topic of the comments, and thus they deal with a wide variety of issues. The following 53 comments are presented in no particular order. Indecipherable words or phrases were replaced with "[?]."

1. Make motels and restaurants more attractive or appealing.
2. One size does not fit all. There is a large difference between the east and west sides of the divide.
3. The local government—including the city council and county commissioners—does not support growth and in fact, are a detriment to development.
4. Don't send another one to me.
5. This county has a lot of changes to make to make it a "destination" spot in the state. It is a very depressed and stagnant town.
6. It is realized that increased tourism is better for county profit. However, it also brings individuals in that don't mind their own business or have respect for those who live here.
7. I see no reason increased tourism could negatively impact Wheatland County. We have beautiful mountains that stretch into the plains, as well as stream and lake fishing; this needs to be advertised or promoted in a better way.
8. I have been trying to find a way to bring in or buy the existing business of a bowling alley, game room and pizza place to this town for about 6 months. I have run into lots of complications, but I believe it would be a good business for the town and my family. I still hope to figure something out.
9. We are in the process of opening a restaurant and strongly would like to promote tourism in Wheatland County.
10. Wheatland County needs to push their historical significance more. Fort [Benton?] is a good example of a community using everything they can to promote tourism in that area.
11. Harlowton is a great community. We need to get more people here and get them good jobs.
12. Harlo is a very nice town now. Good services, newspaper, theater stores, bank, etc. Too much vandalism and parents whose kids can do no wrong.
13. Relax out-of-state hunting regulations and fees. Lower taxes on "out-of-state" landowners. Increase fishing limit to 10 fish/person/day. Low gas prices.
14. I believe that tourism can play a major role in what needs to be a multi-faceted approach to improving the economic situation in our community. If we are not able to start improving the economy here soon, we will not have anything left. We don't have to be like other communities that have basically disappeared. There are a lot of talented people here who can move us forward; we just need to support them in their efforts. The opportunities are here; we need to put aside our old biases and think outside.
15. Change can be a good thing.
16. There is nothing here but ag; tourism in Wheatland County is a red herring.
17. Tear down burned main street buildings (i.e. state theater, Harlo Home Center). Teach business owners and employees to save main street parking for customers.
18. I'm [west] of Martinsdale. The Bair Museum is important to tourists visiting Martinsdale.
19. It seems to me that tourism focus is toward hunting/fishing, which has little or no impact on the general community, just the landowners. Tourism needs to be generated by cultural activities, which would include/benefit more of the community.
20. The natural beauty of Wheatland County is limited if you don't believe this drive to the western part of this state. The Musselshell is not a blue ribbon trout stream; the mountains are not enough influence on most of the county. If you want to increase interest in Wheatland County, we will have to make or build something to increase interest, like a convention center to go hand-in-hand with our rail heritage.
21. The family home of Charles Bair is a great tour stop in Martinsdale. I hope and pray that they greedy bankers & lawyers don't put an end to this wonderful historical place we enjoy. Bair memorials have enhanced our lives hundreds of times over. This should be number one priority to save by you folks, as well as the rest of us. Let's save what we already have.

22. I believe Wheatland County has a lot to offer to tourists. However, I am concerned that it may become the primary focus. Tourists are temperamental and several outside factors influence their decision to travel—fuel prices, airline security, overall US economy—to name a few.
23. The first question in part 3c on the last page needs to be more detailed for a clearer understanding of what it is you are asking.
24. Thanks for facilitating. Looking forward to find results.
25. Tourism is fine but this state needs a sales tax, so the residents of the state don't carry the burden of maintenance for the tourists. We need to keep our young people in our small communities and our state and they're not going to stick around so they can pump gas and wait tables. Tourists that want to live here aren't a problem but too many of them move here to get away from the "city" and then they want changes that bring the lifestyle and ways to mirror what they were trying to get away from.
26. I believe that the overall county will benefit greatly from tourism.
27. Harlowton is a good place to live but because of our distance from major cities, we seem to have become a place for a lot of people who use the welfare system. We have many who are unemployed and don't want to work. We have a problem with drugs and alcohol because of this influx. We are losing a lot of the old hometown values, but I think we are not a lot different than most small towns in this country. Times are changing!
28. Don't send me any of these surveys in the future. I don't think anything will come from this. It just took valuable time from the President of Harlo's largest private employer.
29. Montana needs to wake up and start letting mining come in to help boost the economy. Tourism is not going to pack the load.
30. Montana needs to bring in jobs that will keep our children in Montana.
31. I view use of national forest lands as a primary reason for living here. Thus, access to N.F. lands is very important. All citizens are owners of public lands. I do not like to have my use of such lands controlled by private individuals.
32. Even though we have only lived here for 5 years, my relatives homesteaded this area. We have come to agree with others, we don't want tourists to move here. When we came to the area, we were told by a real estate agent (Tom Hayden) that he would not sell anything to us. Tourism artificially raises prices for goods, fuel and property that we have to compete with. No one wants more taxes to get more highway patrol to service more tour [?].
33. Would like to see tax breaks for new businesses. Need incentives for businesses to move here. Make it profitable for everyone. Advertise what businesses are here. Everyone needs encouragement.
34. On the F.S. access—Make it clear that F.S. would pay and install cattle-guards, signs, necessary maintenance. After all, these forests and all that they have belong to everyone, why should the ranchers, some of whom have been bought by rich, out-of-staters that want private game hunting, be able to deny the rest access?
35. This is more or less a place for senior citizens, retired, living in their own homes as long as possible. Our city provides congregate meals, home delivery meals, [?] transportation, socialization, homemakers health screenings. We miss the Bair Ranch Museum that needs to open and it draws all ages, etc. and helps this county and Meagher County too. And MT [?] personality tourism is OK as is not in huge doses; otherwise, we may lose what we have. Money is not everything, not even close. Too much tourism [?]
36. Would help if the Preservation Committee for the Milwaukee Depot could have more help financially and physically. That would help Harlowton tourism.
37. We need better care and more access control in our forests. Weeds are becoming a huge problem. We need more control over air problems. Allergies and lung problems are growing. There is smoke in the air most days.
38. Our forest is filling with weeds. We need less access, not more. Our air is full of smoke often from "controlled" burns. This does not attract tourists. It also causes allergies and health problems.
39. I think my previous comment in this questionnaire reflect my feelings. Except, how about some classical musical concerts (or even western performers) using the rodeo grounds in summer or high school auditorium in the winter?
40. The businesses in Harlo and Martinsdale will be the ones to reap any benefits of tourism, at least the bulk of it. Therefore, they need to utilize their own funds to improve the town. They need to devote their own time. They need to learn to be genuinely friendly with customers of long-standing, as well of tourists. The whole town needs to contribute to beautifying, lawns, etc. If people won't work to help themselves, no program can be successful.
41. These are hard to answer a straight "agree" or "disagree" because there are some conditions which apply. Conditions of appearances vary in different areas around the city or county. Some good—some not so good.

42. Thank you for giving us this chance to put our thoughts down. Have a nice day! Smile, life is wonderful!
43. Did not answer many questions b/c they do not apply. We live in Meagher County (p.o. Martinsdale) but questions about tourism are similar for both communities.
44. Harlowton could use a variety store such as Ben Franklin or Pamida, also a clothing store.
45. More people would tour Wheatland County and Martinsdale if the Bair Museum was open and active. 5000 people going through the Bair Museum is no small number. Now we will have a replica of the Milwaukee Railroad in the depot in Harlowton set up. These are 2 great landmarks
46. Ran a business for 30 years. Worked in dad's bakery for 20 years. Harlo needs help. Thanks.
47. Sorry this wasn't sent earlier; I mislaid it.
48. During and up to my present state, I have worked as a waitress here and worked at Boeings building the B17s and B29s and 2 office jobs at Seattle during World War II and at Wades Drive in here for five years and always was assured of recommendations if needed.
49. Too many out-of-state money people buying MT ranch property and building summer homes that far exceed the average MT ranch homes...raise taxes, etc.
50. Heavy through traffic; drought effects serious (very); business down (closed down).
51. Have lived in Harlowton for 63 years + 3 in [?]. Like it love it.